Train

User Manual

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The text of this manual is subject to change without notice. The current version of the manual is available from the Train documentation page: www.lmp.co.uk/train_docs.html

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Introducing Electronic Reporting

Part I

1 Introducing Electronic Reporting

Q: What is an Electronic Report?
A: An Electronic Report is simply a computer version of a paper report. It looks the same as the original and contains the same information.

Q: Do Electronic Reports replace paper versions of reports?
A: Yes. Electronic Reports remove the need to hold paper copies of reports, though a printed copy can still be produced if necessary.

Q: How do I know if someone has changed a report?
A: Electronic Reports cannot be altered. The functionality of Train prevents changes being made to reports.

Q: What are the benefits of adopting Electronic Reports?
A: Time - Train will process all reports and automatically identify those which require action.
Peace of mind - Train will quickly identify any inspections which are overdue.
Faster reporting - a report can be received within minutes of leaving the inspecting authority.

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Part II

2 Getting Started

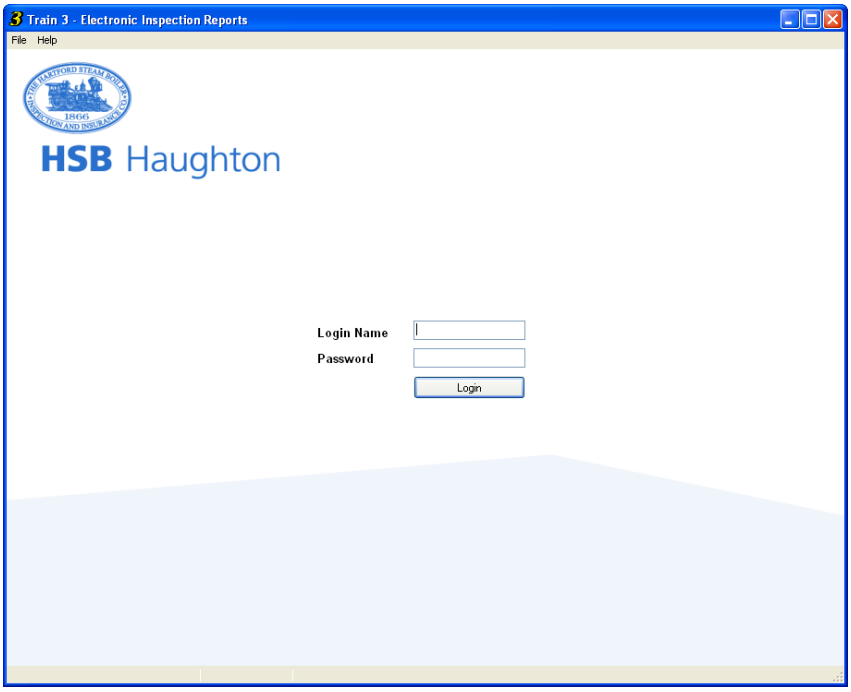
2.1 Logging On

Double-click on the Train icon to access the Logon screen.

Train requires a Username and Password to be entered before access is allowed. This is to:

- ensure that the correct data is made available to individual users,
- protect the integrity of data stored, and
- ensure that the correct security settings are applied to prevent misuse of the system.

Logon Screen



1. Enter the login name and password (as provided by LMP or the System Administrator) into the appropriate boxes.
2. Click **Logon**.

NOTE: Usernames and passwords within Train are not case sensitive – "M BROWN", "M Brown", and "m brown" are all valid. However, the use of punctuation, or spaces between characters, is relevant and where applicable should be maintained.

2.2 Exiting Train

To exit Train and close the program, either:

- Select File > Exit from the Menu Bar, or
- Click the cross in the top right hand corner of the screen.

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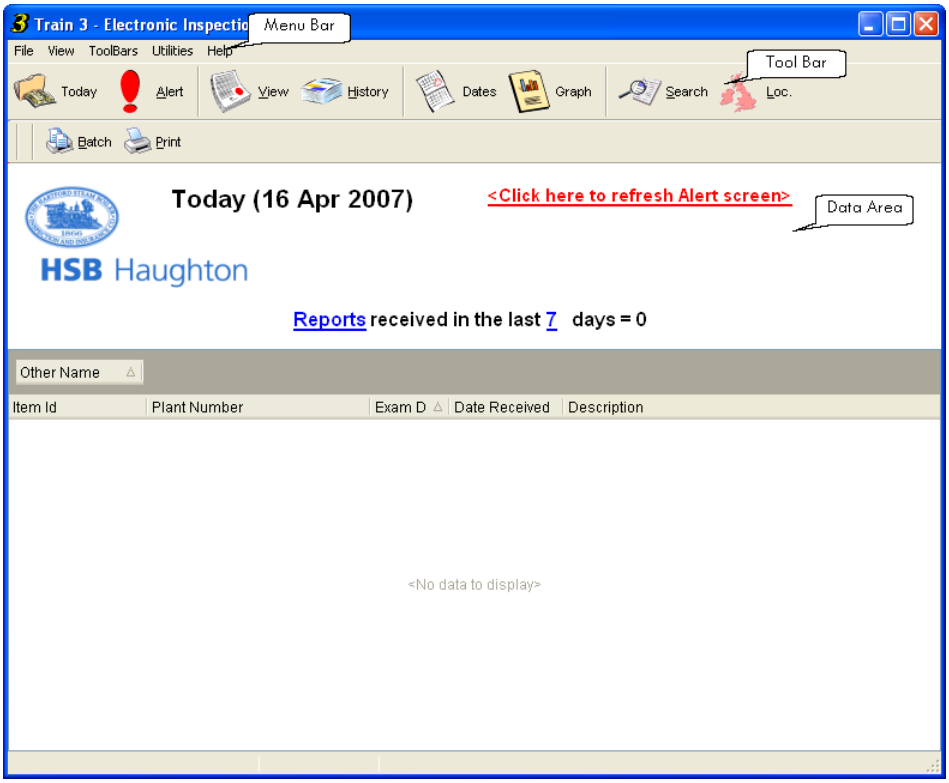
2.3 Screen Layout

All screens within Train share a similar format:



- Menu Bar - this consists of File, View, ToolBars, Utilities and Help menu options and remains static throughout Train.
- Tool Bar - the main navigational point within Train. Click on a Tool Bar option to move to that screen.
- Data Area - information requested from Train is displayed in the Data Area. Data displayed, and actions that can be carried out on the data, vary from screen to screen.

2.4 Email Options

Three email settings are available - Send Email with Outlook; Log Dispatched Emails, and altering the format of emailed lists.

Send Email with Outlook

By default, email messages are sent using the in-built email package and originate from the LMP server. However, where Microsoft Outlook has been installed, it is preferable to enable Outlook as the standard email system in order that messages are sent (and are logged) on the local computer.

To use Outlook to send email:

1. Select Utilities > Configure from the Menu Bar.
2. The "Configure Serve" dialog box will open on the **Alert Options** tab.

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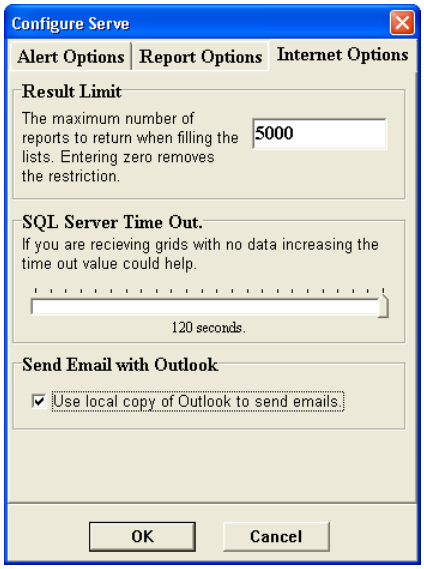
3. Select the **Internet Options** tab:

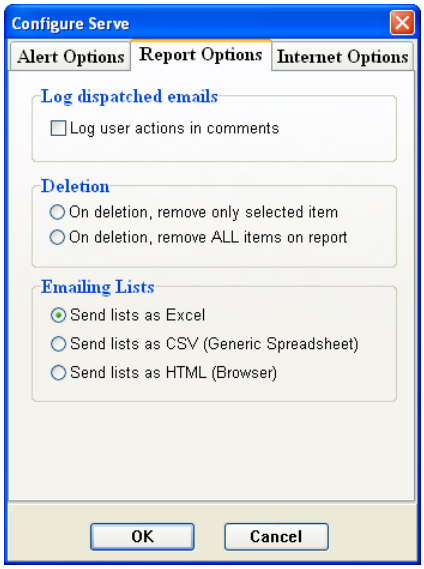

Configure Serve
Alert Options
Report Options
Internet Options
Result Limit
The maximum number of reports to return when filling the lists. Entering zero removes the restriction.
5000
SQL Server Time Out.
If you are recieving grids with no data increasing the time out value could help.
120 seconds.
Send Email with Outlook
Use local copy of Outlook to send emails.
OK
Cancel

4. Click into the "Use local copy of Outlook to send emails." box in order to enable the option.
5. Click **OK** to apply the setting.

Log Dispatched Emails

Where this option is enabled, any report emailed from Train will have details of the date and time the email was sent (and by whom) recorded in its User Comments field.

1. Select Utilities > Configure from the Menu Bar.
2. The "Configure Serve" dialog box will open on the **Alert Options** tab.
3. Select the **Report Options** tab:



4. Click into the "Log user actions in comments" box in order to enable the option.
5. Click **OK** to apply the setting.

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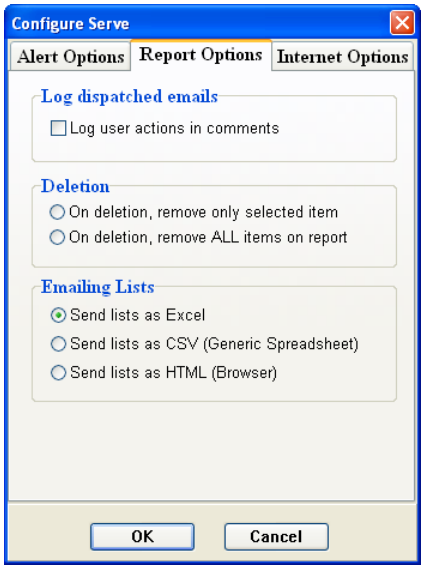
Format of emailed lists

By default reports are emailed from Train as attachments in Excel format. This format allows data to be manipulated by the recipient, provided Excel is available on their computer. Other email format options are .html (browser based view) - which will present data in a format which can be viewed by any recipient but which cannot be manipulated - or .csv (a generic spreadsheet format).

To amend the format of emailed lists:

1. Select Utilities > Configure from the Menu Bar.
2. The "Configure Serve" dialog box will open on the **Alert Options** tab.
3. Select the **Report Options** tab:



3. Click the button next to the format in which the attachments are to be sent and then click **OK** to apply the setting.

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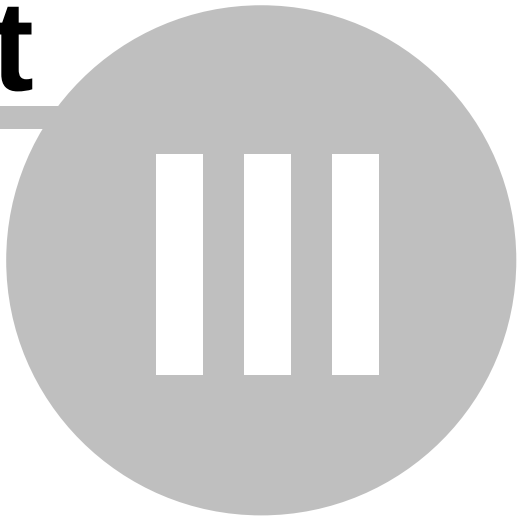
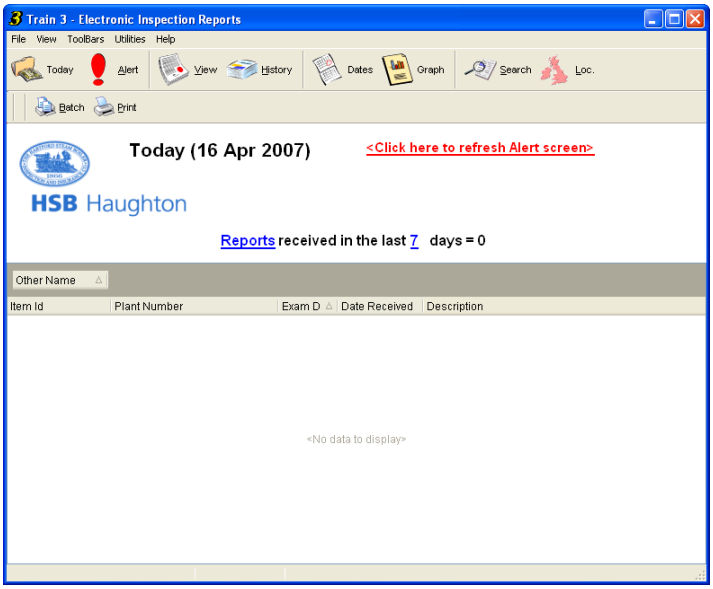
Part



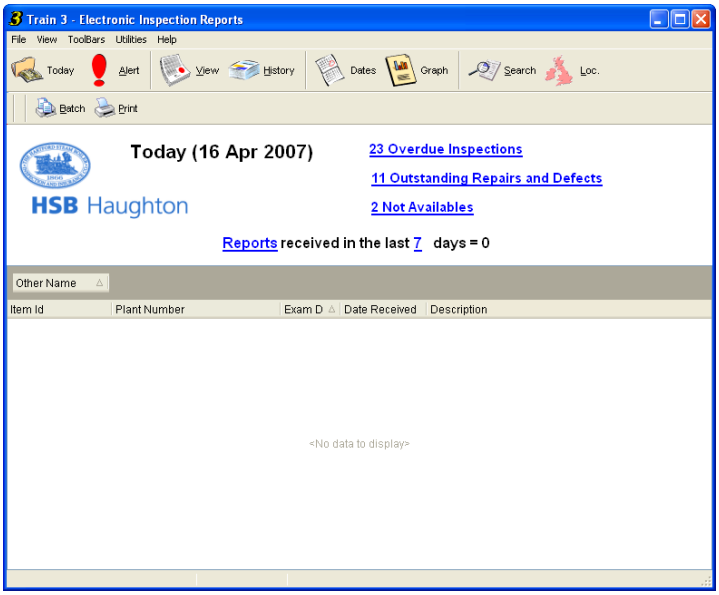
3 Today

On start-up, Train will open onto the "Train Today" page:



By default, this displays a list of **reports** received within the last **28** days. This view may be altered to show **items** rather than reports and the time-frame can be changed to 1, 7, 14, 21 or 28 days. To choose to view items or to change the time-frame, click on **Reports** or **28** and select the required option from the subsequent drop-down list.

Clicking on <Click here to refresh Alert screen> will display the Alert screen. If the Today page is re-selected, the view will alter:



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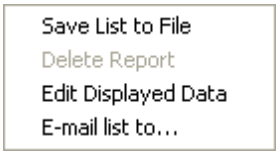
The new links operate thus:

Action	On What	Result
Single click	Overdue Inspections	Switches to the Alert page and displays list of overdues
Single click	Outstanding Serious Defects	Switches to the Alert page and displays list of items with Outstanding Defects
Single click	Not Availables	Switches to the Alert page and displays list of Not Availables

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

To save the currently displayed report listing:

1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Delete Report

Where an item of plant no longer exists, it may be appropriate to delete associated reports. NOTE: Once a report has been deleted, it can not be re-instated.

To delete a report:

1. Click on the required report.
2. Right-click and select "Delete Report" from the subsequent menu.
3. In the subsequent "Confirm" dialog box, click **OK** to confirm, or **Cancel** to abandon the deletion of the report.

Edit Displayed Data

Edit Displayed Data allows the customization of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.

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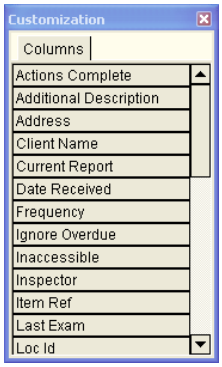
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select

View from the Tool Bar.

Email the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "e-mail report to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report will be sent as an attachment to the email.

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Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See **Email Options** for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click "Email Batch" on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Save the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Printing reports

Individual reports

To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or
   - Click the icon on the Tool Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Multiple reports

To print a copy of multiple reports:

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).

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2. Click the icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

To print the currently displayed report listing:

1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

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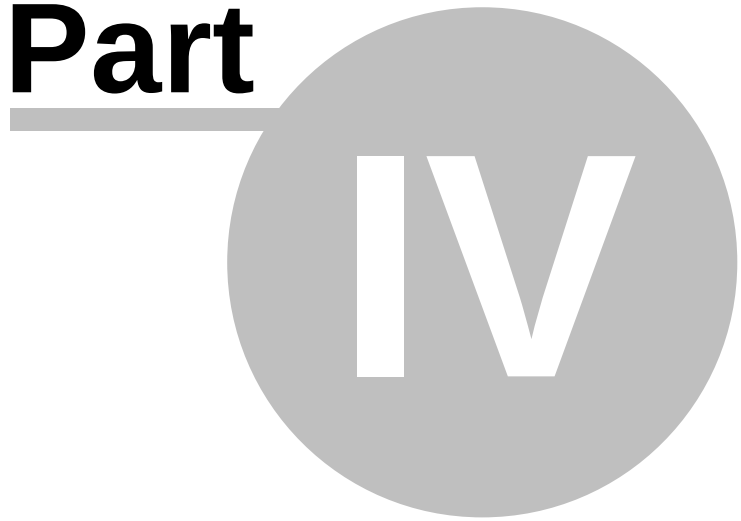
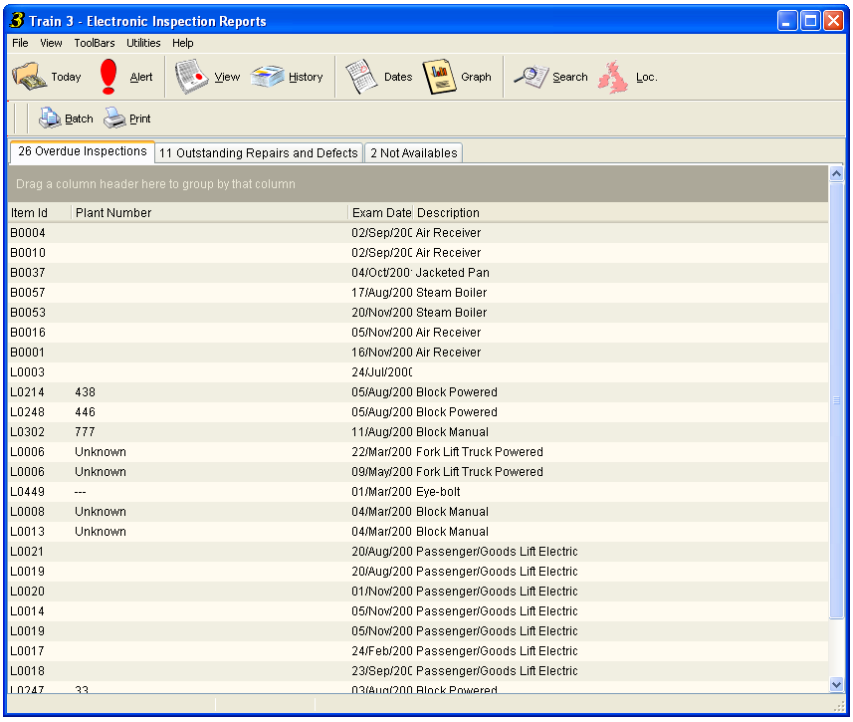
Alert (Report Overview)



4 Alert (Report Overview)

The Alert screen is accessed either via the Alert icon or by selecting the option to <Click here to refresh Alert screen> on the "Train Today" page. It offers a quick overview, through the use of three tabs, of those inspections which:

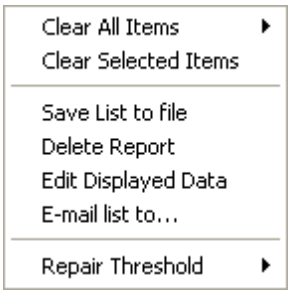
- have overdue reports listed against them and require a more recent inspection report (Overdue Inspections).
- require remedial action by the owner/user of the plant (Outstanding Repairs - Time Qual. + Immediate Repair).
- could not have an examination carried out (Not Availables).


Train 3 - Electronic Inspection Reports
File View ToolBars Utilities Help
Today Alert View History Dates Graph Search Loc.
Batch Print
26 Overdue Inspections
11 Outstanding Repairs and Defects
2 Not Availables
Drag a column header here to group by that column
Item Id Plant Number Exam Date Description
B0004 02/Sep/20(Air Receiver
B0010 02/Sep/20(Air Receiver
B0037 04/Oct/200 Jacketed Pan
B0057 17/Aug/200 Steam Boiler
B0053 20/Nov/200 Steam Boiler
B0016 05/Nov/200 Air Receiver
B0001 16/Nov/200 Air Receiver
L0003 24/Jul/200(
L0214 438 05/Aug/200 Block Powered
L0248 446 05/Aug/200 Block Powered
L0302 777 11/Aug/200 Block Manual
L0006 Unknown 22/Mar/200 Fork Lift Truck Powered
L0006 Unknown 09/May/200 Fork Lift Truck Powered
L0449 --- 01/Mar/200 Eye-bolt
L0008 Unknown 04/Mar/200 Block Manual
L0013 Unknown 04/Mar/200 Block Manual
L0021 20/Aug/200 Passenger/Goods Lift Electric
L0019 20/Aug/200 Passenger/Goods Lift Electric
L0020 01/Nov/200 Passenger/Goods Lift Electric
L0014 05/Nov/200 Passenger/Goods Lift Electric
L0019 05/Nov/200 Passenger/Goods Lift Electric
L0017 24/Feb/200 Passenger/Goods Lift Electric
L0018 23/Sep/20(Passenger/Goods Lift Electric
L0247 33 03/Aug/200 Block Powered

By default, the Alert screen opens on the Overdue Inspections tab. However, each of the tabs presents information in the form of a report listing.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



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Clear All Items

Depending on the currently selected tab, clicking this option will clear all overdue inspections, items marked as not available or any defects. A **Confirm** option will open to ensure that items are not cleared in error.

Clear Selected Items

1. Select the items to clear:
   - To select items distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select items adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Right-click on a highlighted item and click **Clear Selected Items** from the subsequent menu. The items will be marked as cleared.

Save List to file

To save the currently displayed report listing:

1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Delete Report

Where an item of plant no longer exists, it may be appropriate to delete associated reports. NOTE: Once a report has been deleted, it can not be re-instated.

To delete a report:

1. Click on the required report.
2. Right-click and select "Delete Report" from the subsequent menu.
3. In the subsequent "Confirm" dialog box, click **OK** to confirm, or **Cancel** to abandon the deletion of the report.

Edit Displayed Data

Edit Displayed Data allows the customization of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.

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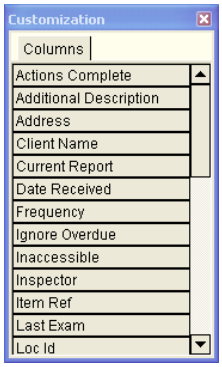
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select

View from the Tool Bar.

Email the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "e-mail report to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report will be sent as an attachment to the email.

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Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See **Email Options** for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click "Email Batch" on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Save the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Printing reports

Individual reports

To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or
   - Click the icon on the Tool Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Multiple reports

To print a copy of multiple reports:

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).

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2. Click the Batch icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

To print the currently displayed report listing:

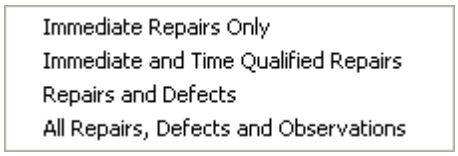
1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

Repair Threshold

The repair threshold displayed on the "Outstanding Repairs" tab may be amended.

To change the displayed threshold:

1. Right-click in the Data Area of the Alert screen.
2. Select "Repair Threshold".
3. A menu will open:


Immediate Repairs Only
Immediate and Time Qualified Repairs
Repairs and Defects
All Repairs, Defects and Observations

4. Click on the required threshold level.
5. The Outstanding Repairs tab will automatically refresh to reflect the newly selected Repair Threshold.

4.1 Overdue Inspections

Clearing Overdue Inspections

Overdue Inspections are automatically cleared from the Alert screen when a new report is received. However, where an asset has been scrapped or mothballed, its details may be removed from the Overdue Inspections or Not Availables tabs by amending the User Comments section of the last received report:

1. Double-click on the required item to view the last received report.
2. Scroll to the foot of the report and click into the "Remove from Overdue List" tick box.
3. Select the appropriate category from the drop-down list in the User Status box.
4. Add any necessary detail in the User Comments field.
5. Click the Alert icon to return to the Alert screen. The Alert screen will automatically refresh to reflect any changes.

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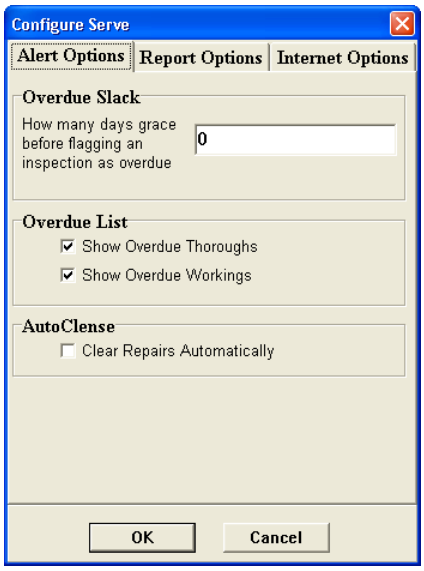
Overdue Slack period

It is possible to increase the number of days between the examination of an asset and the report for this examination being received (Overdue Slack period). By default, the Overdue Slack period is set to 0.

To increase the Overdue Slack:

1. Select Utilities > Configure from the Menu Bar.
2. The "Configure Serve" dialog box will open on the **Alert Options** tab:



3. Click into the **Overdue Slack** box and input the required number of days grace.
4. Click **OK**. The "Configure Serve" dialog box will close and the Alert screen will automatically refresh to reflect any changes.

Overdue List

The reports displayed on the Overdue List may be altered to show all overdue inspections, overdue Thorough inspections or overdue Working inspections:

1. Select Utilities > Configure from the Menu Bar.

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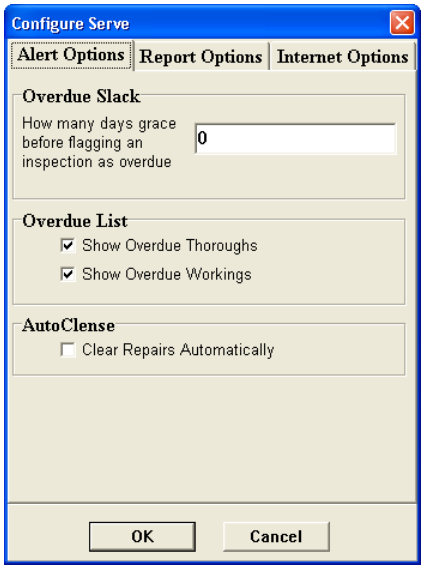
2. The "Configure Serve" dialog box will open on the **Alert Options** tab:



3. Click the tick boxes in the **Overdue List** box to toggle the inspection types on or off.
4. Click **OK**. The "Configure Serve" dialog box will close and the Alert screen will automatically refresh to reflect any changes.

4.2 Repairs

Repair Threshold

Four levels of repair categorisation are offered by Train. The Repair Thresholds are:

- Immediate Repairs only - statutory repairs requiring immediate attention.
- Immediate and Time Qualified Repairs - as above and time-qualified statutory repairs.
- Repairs and Defects - repairs or defects which have been noted, but which are not statutory repairs.
- All Repairs and Observations - as above with any comments.

The currently selected Repair Threshold is indicated by the name of the "Outstanding Repairs" tab. To change the displayed threshold:

1. Right-click in the Data Area of the Alert screen.
2. Select "Repair Threshold" and then the required level of categorisation from the subsequent menu.
3. The Outstanding Repairs tab will automatically refresh to reflect the newly selected Repair Threshold.

Outstanding Repairs

Repair information is automatically cleared from the Alert screen when a new report which does not list any repairs is received. Where an asset is repaired following an inspection, it is possible to remove it from the Outstanding Repairs screen:

1. Double-click on the required item to view the last received report.
2. Scroll to the foot of the report and click into the "Remove Actions Reminder" tick box.
3. Select the appropriate category from the drop-down list in the "User Status" box if

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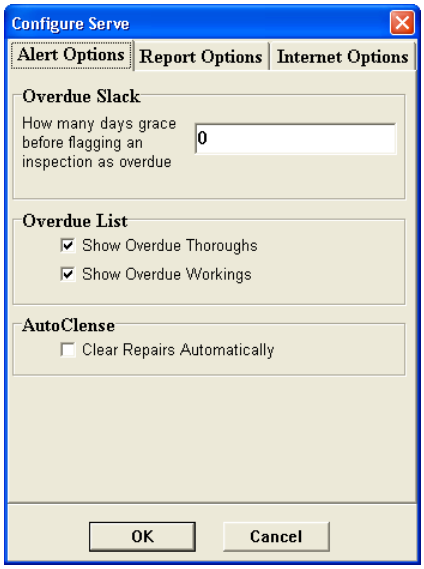
required.

4. Add any necessary detail in the **User Comments** field.
5. Click the Alert icon to return to the Alert screen. The Alert screen will automatically refresh to reflect any changes.

AutoClense

By default, all outstanding repairs are displayed. This view may be amended to display only those repairs identified by the most recent report through the user of "AutoClense":

1. Select Utilities > Configure from the Menu Bar.
2. The "Configure Serve" dialog box will open on the **Alert Options** tab:



3. Click into the **AutoClense** tick box.
4. Click **OK**. The Configure Serve dialog box will close and the Alert screen will automatically refresh to remove any superseded repairs.

4.3 Not Available

Reports listed on the 'Not Available' tab are reports of non-inspection. Reasons for the non-inspection are detailed within individual reports. Double-click on the required report in order to view the details and reasons for non-inspection.

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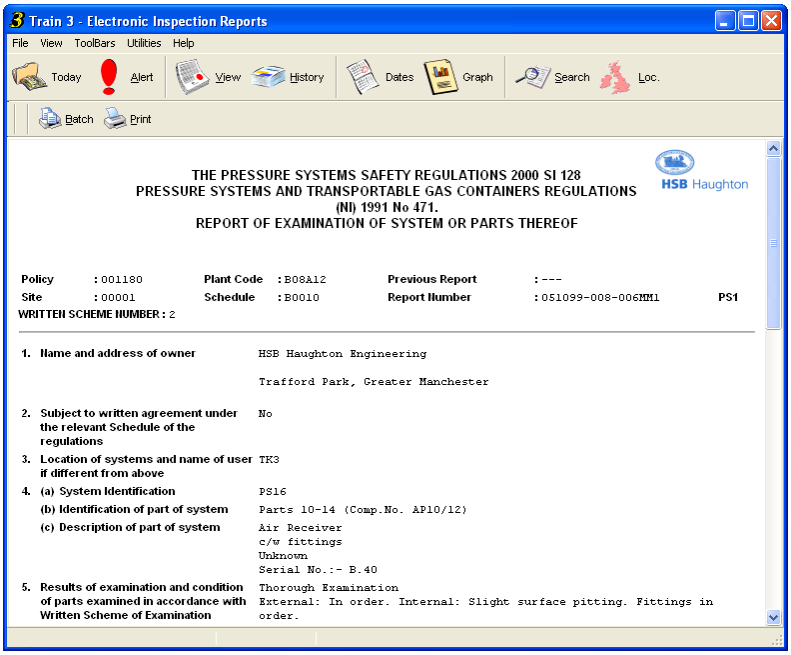
Part V

5 View

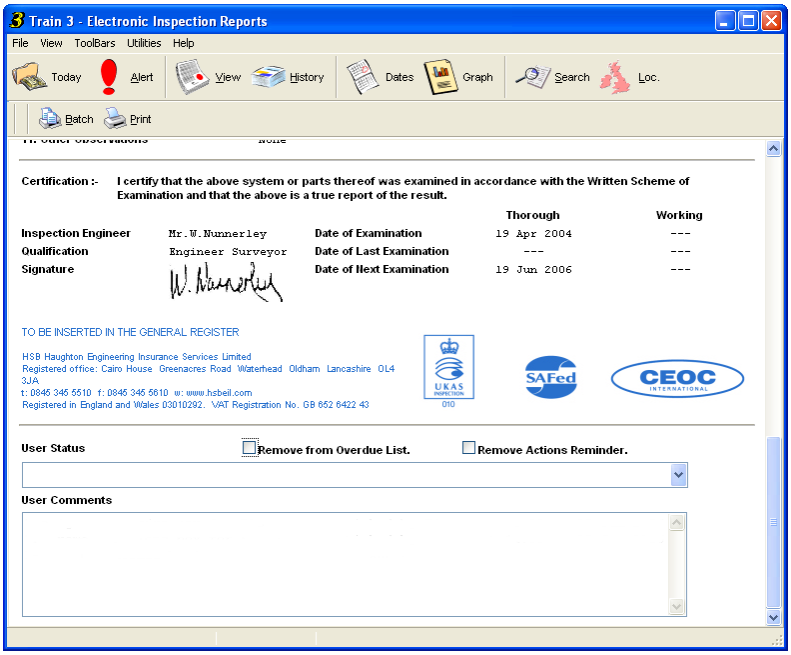
The View option displays the selected report on the screen in a similar format to the paper version:


Train 3 - Electronic Inspection Reports
File View ToolBars Utilities Help
Today Alert View History Dates Graph Search Loc.
Batch Print
THE PRESSURE SYSTEMS SAFETY REGULATIONS 2000 SI 128
PRESSURE SYSTEMS AND TRANSPORTABLE GAS CONTAINERS REGULATIONS
(NI) 1991 No 471.
REPORT OF EXAMINATION OF SYSTEM OR PARTS THEREOF
HSB Haughton
Policy : 001180 Plant Code : B08A12 Previous Report : ---
Site : 00001 Schedule : B0010 Report Number : 051099-008-006MM1 PS1
WRITTEN SCHEME NUMBER : 2
1. Name and address of owner HSB Haughton Engineering
Trafford Park, Greater Manchester
2. Subject to written agreement under the relevant Schedule of the regulations No
3. Location of systems and name of user if different from above TK3
4. (a) System Identification PS16
(b) Identification of part of system Parts 10-14 (Comp.No. AP10/12)
(c) Description of part of system Air Receiver
c/w fittings
Unknown
Serial No.:- B.40
5. Results of examination and condition of parts examined in accordance with Written Scheme of Examination Thorough Examination
External: In order. Internal: Slight surface pitting. Fittings in order.

Normally, the entire report will not fit onto the screen, so a scroll bar at the right hand edge allows a view of the whole report to be obtained through scrolling up or down.

User Comments

Uniquely, electronic reporting offers a User Comments section. This enables the tracking of actions performed as a result of the report and also allows the action and overdue reminders for a particular report to be disenabled:


Train 3 - Electronic Inspection Reports
File View ToolBars Utilities Help
Today Alert View History Dates Graph Search Loc.
Batch Print
Certification :- I certify that the above system or parts thereof was examined in accordance with the Written Scheme of Examination and that the above is a true report of the result.
Thorough Working
Inspection Engineer Mr.W.Nunnerley Date of Examination 19 Apr 2004 ---
Qualification Engineer Surveyor Date of Last Examination --- ---
Signature Date of Next Examination 19 Jun 2006 ---
TO BE INSERTED IN THE GENERAL REGISTER
HSB Haughton Engineering Insurance Services Limited
Registered office: Cairo House Greenacres Road Waterhead Oldham Lancashire OL4 3JA
t: 0845 345 5510 f: 0845 345 5610 w: www.hsbeil.com
Registered in England and Wales 03010292. VAT Registration No. GB 652 6422 43
UKAS INSPECTION 010
SAFed
CEOC INTERNATIONAL
User Status
Remove from Overdue List.
Remove Actions Reminder.
User Comments

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To record a comment:

Field Name	Action	Result
Remove from Overdue List.	Single Click	Once selected, the current report will no longer appear in the "Overdue Inspection" list of the **Alert** screen.
Remove Actions Reminder.	Single Click	Once selected, the current report will no longer appear in the "Outstanding Defects" list of the **Alert** screen.
User Status	Click the drop-down arrow to right-hand end of box	Select an option from the drop-down list to place a categorisation against the selected report.
User Comments	Text entry	Click into the box under "User Comments" and input required text. Information input here will be stored with the current report and appear in subsequent printouts.

Additionally, the following information will be automatically recorded in the "User Comments" section:

- If a report is emailed then the date and time the report was sent will be recorded.
- If any amendments are made to the "User Actions" or "User Status" sections of a report, the user details, date and time and action carried out will be recorded.

Printing a report

To print a copy of the report currently displayed either:

- Select File > Print from the Menu Bar, or
- Click the icon on the Tool Bar.

The standard Windows print control box will then open offering a choice of printer.

If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Exporting Reports

Reports may be saved to a file or emailed from Train.

To email a report:

1. Right-click in the Data Area of the report.
2. Select "e-mail report to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report will be sent as an attachment to the email.

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To save a report:

1. Right-click in the Data Area of the report.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

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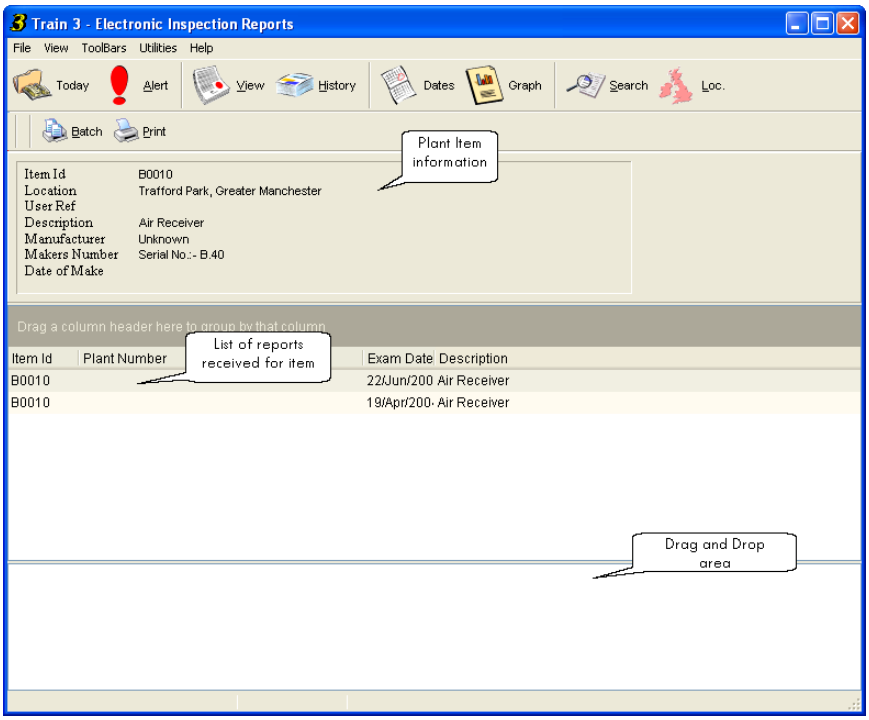
Part VI

6 History

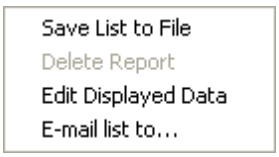
The History screen provides detailed information on a selected item of plant and displays all reports that have been received for the selected item.

HINT: To view the History screen, an item of plant must first be selected - if no asset or report has been selected, clicking the History icon will have no effect.


Train 3 - Electronic Inspection Reports
File View ToolBars Utilities Help
Today Alert View History Dates Graph Search Loc.
Batch Print
Plant Item information
Item Id B0010
Location Trafford Park, Greater Manchester
User Ref
Description Air Receiver
Manufacturer Unknown
Makers Number Serial No.:- B.40
Date of Make
Drag a column header here to group by that column
List of reports received for item
Item Id Plant Number Exam Date Description
B0010 22/Jun/200 Air Receiver
B0010 19/Apr/200 Air Receiver
Drag and Drop area

Report List

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

To save the currently displayed report listing:

1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

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Delete Report

Where an item of plant no longer exists, it may be appropriate to delete associated reports. NOTE: Once a report has been deleted, it can not be re-instated.

To delete a report:

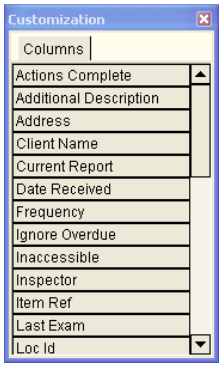
1. Click on the required report.
2. Right-click and select "Delete Report" from the subsequent menu.
3. In the subsequent "Confirm" dialog box, click **OK** to confirm, or **Cancel** to abandon the deletion of the report.

Edit Displayed Data

Edit Displayed Data allows the customization of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

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Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select

View from the Tool Bar.

Email the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "e-mail report to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See **Email Options** for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click "Email Batch" on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Save the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

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Printing reports

Individual reports

To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or
   - Click the Print icon on the Tool Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Multiple reports

To print a copy of multiple reports:

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Batch icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

To print the currently displayed report listing:

1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

Attaching Documents

Train enables documents (for example, scanned images or Word documents) to be stored against an individual asset through "drag and drop". To attach a document:

1. Navigate to the location in which the required file is held.
2. Click on the required file name and, holding down the left-hand mouse button, drag the file to the Drag and Drop Area of the History screen and release the mouse key.
3. In the subsequent "Document Details" dialog box, select how to save the document:
   - Document stored in database - a copy of the document will be stored in the Train database. This is the most secure method of saving a file as, once saved, the file

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cannot subsequently be altered.

- Document stored as link - saving files as links creates a shortcut from the Train database to the location in which the file is held. Any changes made to the file will be reflected in the file accessed via Train.

4. Add a Document Description.
5. Click **OK** to save the document, or **Cancel** to abandon the file attachment.

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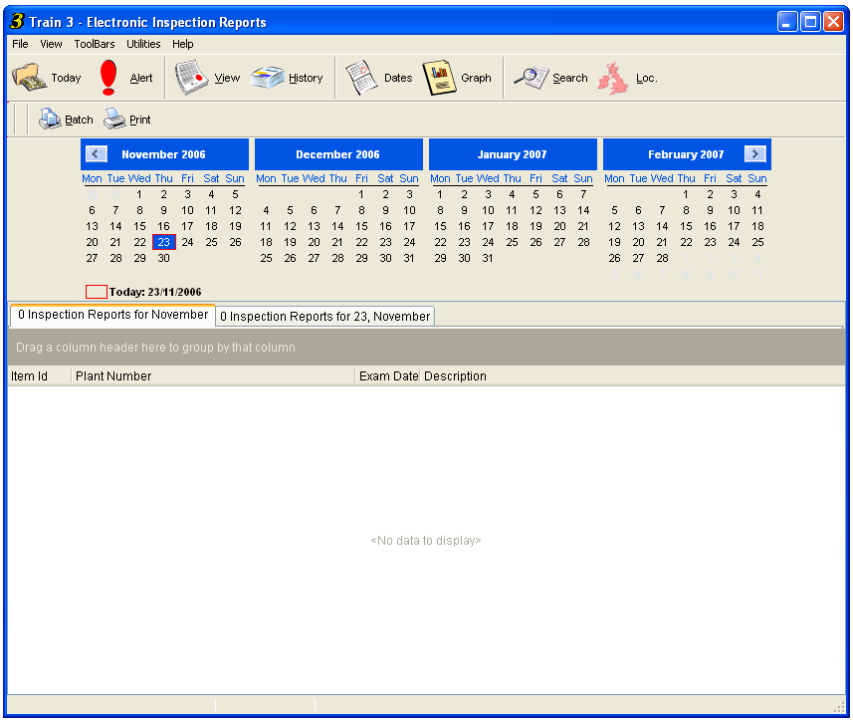
Part VII

7 Dates

The Dates screen provides details of which reports have been received on a particular month or day. To access the Dates screen, select

from the Menu Bar:



The top half of the screen is a calendar which defaults to today's date. The lower half of the screen has two tabs which display Inspection Reports received. By default, the first tab displays reports received in the current month, whilst the second tab displays reports received on the current day.

Changing the displayed dates:

- To change the **year** - click on the year in the heading above any of the month calendars. Up/Down arrows will display which can be clicked to move forwards or backwards by year.
- To change the **month** - click on the name of one of the months above the calendars. A drop-down list of month names will display. Click the required month to change the view.
- To change the **date** - click on any of the dates in the displayed calendars to update to the selected date.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:

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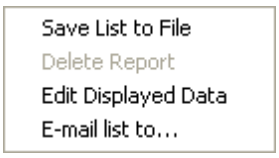


Save List to file

To save the currently displayed report listing:

1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Delete Report

Where an item of plant no longer exists, it may be appropriate to delete associated reports.
NOTE: Once a report has been deleted, it can not be re-instated.

To delete a report:

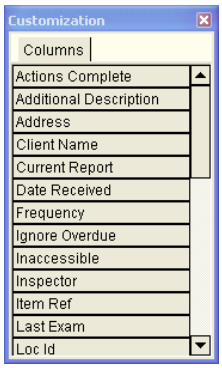
1. Click on the required report.
2. Right-click and select "Delete Report" from the subsequent menu.
3. In the subsequent "Confirm" dialog box, click **OK** to confirm, or **Cancel** to abandon the deletion of the report.

Edit Displayed Data

Edit Displayed Data allows the customization of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

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To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select

View from the Tool Bar.

Email the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "e-mail report to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See **Email Options** for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click "Email Batch" on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

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Save the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Printing reports

Individual reports

To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or
   - Click the Print icon on the Tool Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Multiple reports

To print a copy of multiple reports:

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Batch icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

To print the currently displayed report listing:

1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

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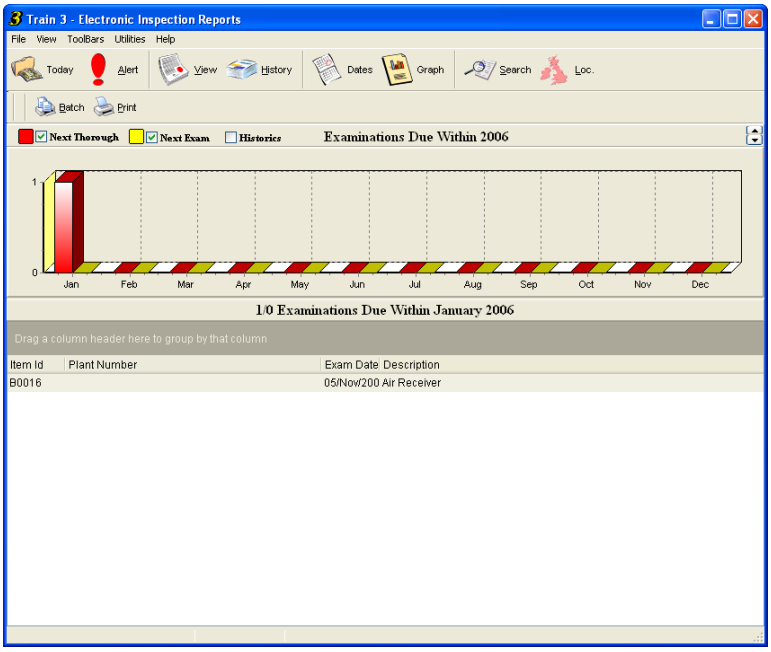
Graph

Part VII

8 Graph

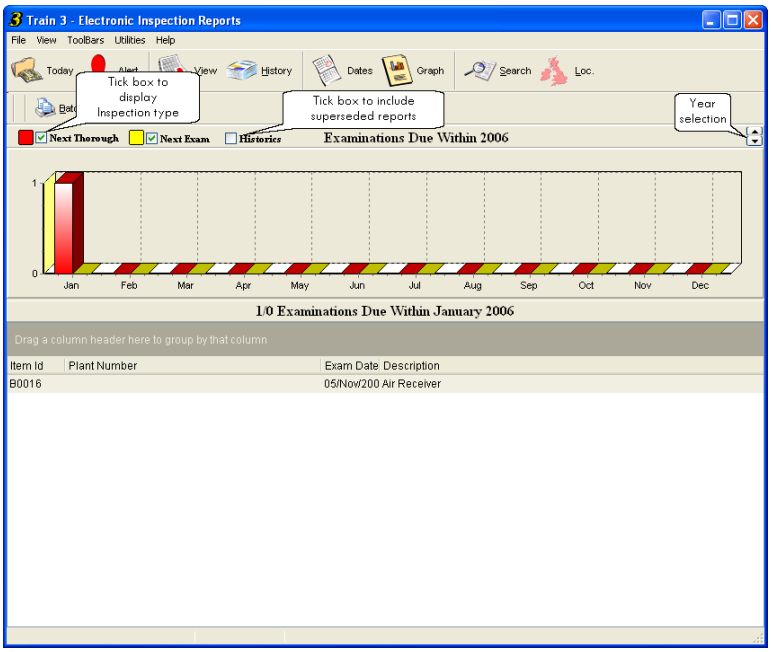
From information contained within previously issued reports, Train produces graphs to show when the next inspection for a particular item of plant is due. To access the graphing option, click

on the Tool Bar. The graph screen will open, showing a graph of "Next Thorough" and "Next Exam" due within the current year and a report listing of "Next Thorough" and "Next Exam" due within the current month:


Train 3 - Electronic Inspection Reports
File View ToolBars Utilities Help
Today Alert View History Dates Graph Search Loc.
Batch Print
Next Thorough Next Exam Historics
Examinations Due Within 2006
1
0
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
1/0 Examinations Due Within January 2006
Drag a column header here to group by that column
Item Id Plant Number Exam Date Description
B0016 05/Nov/200 Air Receiver

8.1 Working with Graph

The default options on the Graph screen may be altered to amend the information graphed and displayed:


Train 3 - Electronic Inspection Reports
File View ToolBars Utilities Help
Today View History Dates Graph Search Loc.
Tick box to display Inspection type
Tick box to include superseded reports
Year selection
Next Thorough Next Exam Historics
Examinations Due Within 2006
1
0
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
1/0 Examinations Due Within January 2006
Drag a column header here to group by that column
Item Id Plant Number Exam Date Description
B0016 05/Nov/200 Air Receiver

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Inspection Type and Superseded Reports

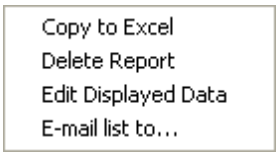
The "Next Thorough", "Next Exam" and "Historics" tick boxes may be ticked/unticked to alter the information presented by the graph. The "Next Thorough" and "Next Exam" tick boxes control which type of inspection to display, whilst the Historics box controls whether superseded reports are displayed. As the selection is amended, the Graph screen will automatically update to reflect the changes.

Time frame displayed

By default, the current year and month are displayed when Graph is first selected. To amend the year, click the Year selection arrows to increase or decrease the year as required. To change the reports displayed in the Report Listing area, click on one of the month bars of the graph to show the reports for that month.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Copy to Excel

To save the currently displayed report listing to an Excel spreadsheet:

1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Delete Report

Where an item of plant no longer exists, it may be appropriate to delete associated reports. NOTE: Once a report has been deleted, it can not be re-instated.

To delete a report:

1. Click on the required report.
2. Right-click and select "Delete Report" from the subsequent menu.
3. In the subsequent "Confirm" dialog box, click **OK** to confirm, or **Cancel** to abandon the deletion of the report.

Edit Displayed Data

Edit Displayed Data allows the customization of information presented on the report listing.

To add fields to a view:

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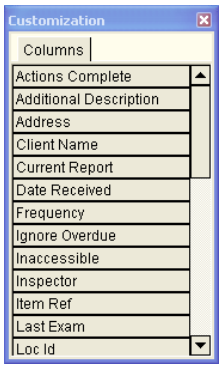
1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select

View from the Tool Bar.

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Email the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "e-mail report to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See **Email Options** for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click "Email Batch" on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Save the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Printing reports

Individual reports

To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or
   - Click the icon on the Tool Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Multiple reports

To print a copy of multiple reports:

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1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the

icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

To print the currently displayed report listing:

1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

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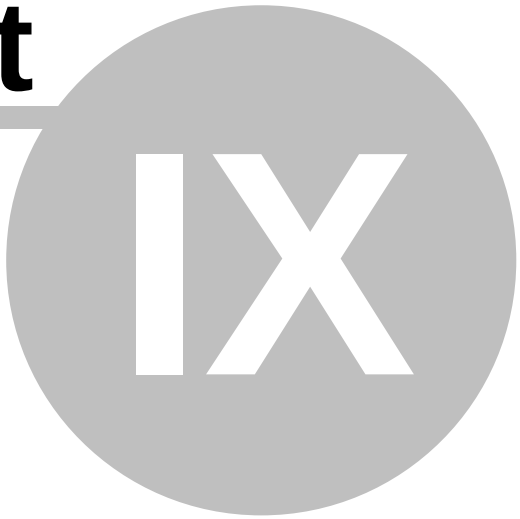
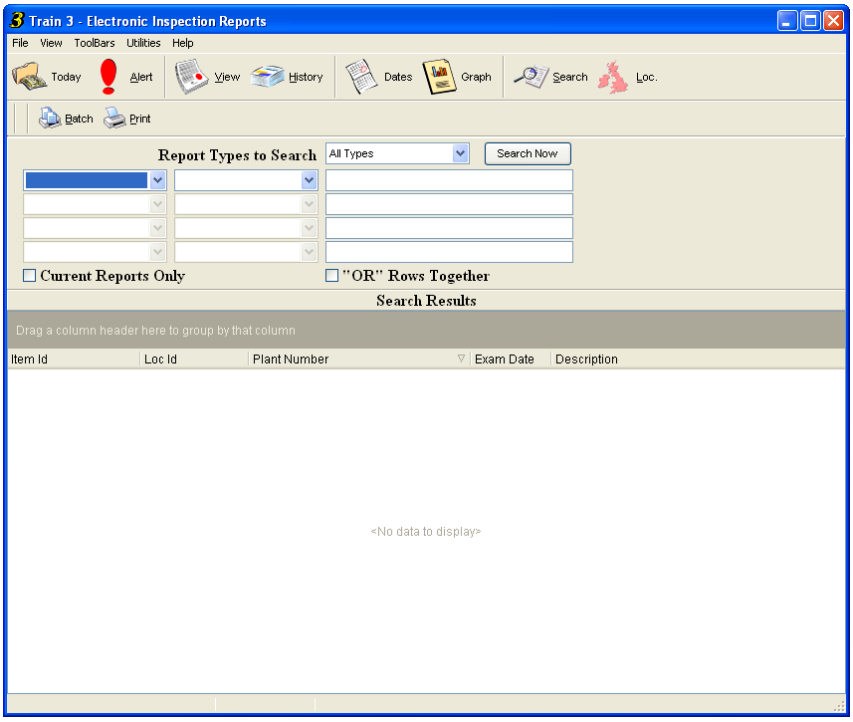
Search

Part



9 Search

Search enables the creation lists of reports that conform to user-designed criteria.



Building a search

1. Select from the Tool Bar.
2. The Search screen will open as above.
3. Select the "Report Types to Search" from the drop-down list. The default setting is "All Types" but the full listing is:

    - All Types
    - Pressure Plant
    - Lifting Equipment / Lifts
    - General Plant
    - Power Press
    - Local Exhaust Ventilation
    - Not Availables

    Selecting any other type than "All Types" will restrict the returned search results to just one category of report.

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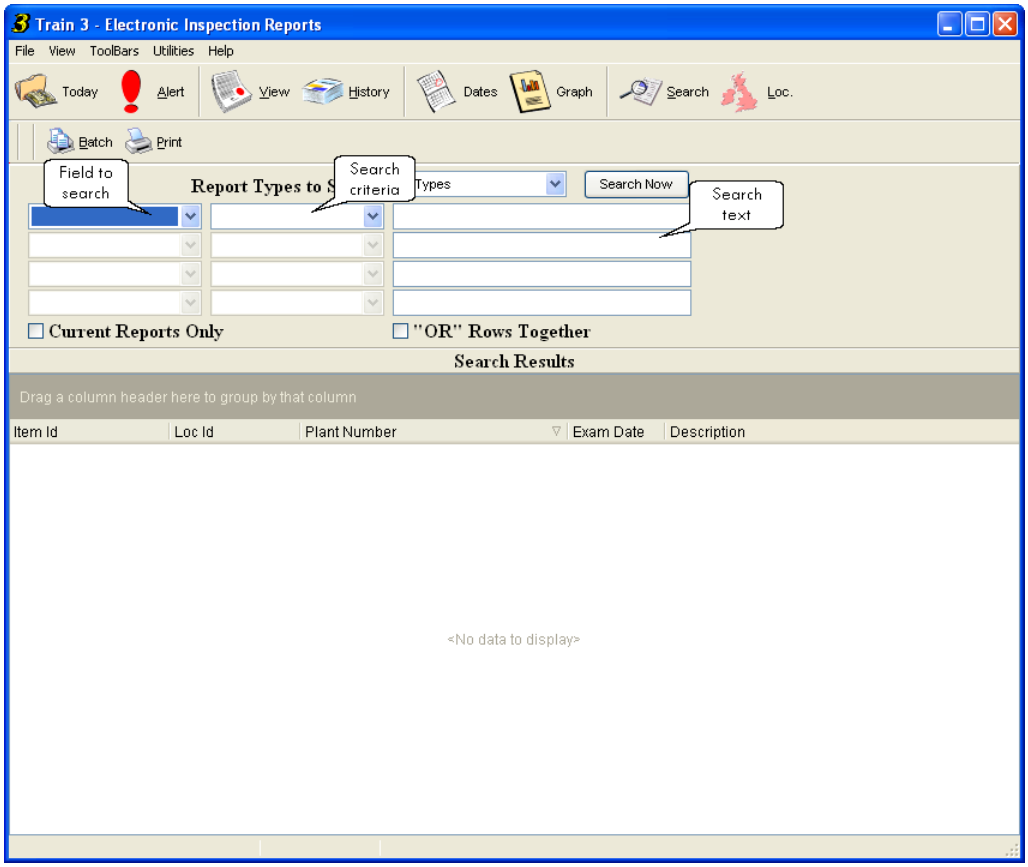
4. Now build the search rules:



   i) Select the field to be searched from the drop-down menu in the left-hand box ("Field to search" box).
   ii) Select the appropriate search criteria to be applied to the search from the drop-down list in the middle box ("Search criteria" box).
   iii) Input the text to search for in the right-hand box ("Search text" box).
   iv) Repeat steps i-iii in the other rows of the search as required (a maximum of four rows of search terms is available).
5. By default, all reports will be searched. To limit the search to the most recently received report, click into the "Current Reports Only" tick box.
6. Where more than one row of search criteria is constructed, by default the rows will be linked with an AND command. This will return results only for those records where all criteria are met. To link search criteria with an OR command (where results will be returned for records where any of the criteria are met), click into the "OR Rows Together" tick box.
7. Click **Search Now** to display the results of the search.

Searching Text Fields

Fields that are text based (for example Item Id, Description, Location, Manufacturer etc) offer the following criteria:

- Contains
- Doesn't contain
- Is exactly
- Is not

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For example, to search for reports containing the manufacturer "Craven":

1. Ensure "All Types" is selected in the Report Type field.
2. Select "Manufacturer" from the drop-down list in the left-hand search box.
3. Select "Contains" from the drop-down list in the middle search box.
4. Input "Craven" in the right-hand search box.
5. Click into the "Current Reports Only" text box.
6. Click **Search Now** to display the results of the search.

Searching Date Fields

Fields that are date based (for example Next Thorough Date, Exam Date etc) offer the following criteria:

- Is before the
- Is after the
- Is on or before the
- Is on or after the
- Is the
- Is not the

To search for all reports with an Exam date between 30 June 2006 and 31 January 2007:

1. Ensure "All Types" is selected in the Report Type field.
2. Select "Exam Date" from the drop-down list in the left-hand search box.
3. Select "Is on or after the" from the drop-down list in the middle search box.
4. Input "30/6/06" in the right-hand search box.
5. In the left-hand search box of the second row, select "Exam Date" from the drop-down box.
6. Select "Is on or before the" from the drop-down list in the middle search box.
7. Input "31/1/07" in the right-hand search box.
8. Click into the "Current Reports Only" text box.
9. Click **Search Now** to display the results of the search.

Searching for Repairs by Severity

It is possible to search for repairs by severity. However, within Train, the severity of repairs detailed is stored as a number in the range 1 to 5. The numbers relate to severity:

5 - Immediate Repairs
4 - Time qualified Repairs
3 - Repairs and Defects
2 - Observations
1 - Clear

Criteria available on the Severity field are:

- Is less than
- Is greater than
- Is exactly
- Is not

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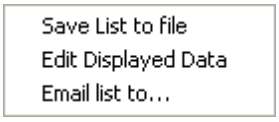
For example, to search for immediate repairs listed on current reports:

1. Ensure "All Types" is selected in the Report Type field.
2. Select "Severity" from the drop-down list in the left-hand search box.
3. Select "Is Exactly" from the drop-down list in the middle search box.
4. Input "5" in the right-hand search box.
5. Click into the "Current Reports Only" text box.
6. Click **Search Now** to display the results of the search.

9.1 Working with Search Results

Search results form a Report List.
The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

To save the currently displayed report listing:

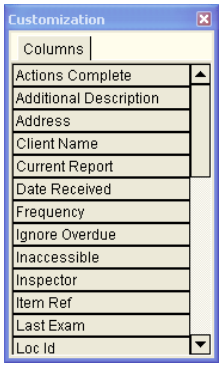
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Edit Displayed Data

Edit Displayed Data allows the customization of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-

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hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select

View from the Tool Bar.

Email the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "e-mail report to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See **Email Options** for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click "Email Batch" on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.

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5. Click **Send**. The reports will be sent as attachments to the email.

Save the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Printing reports

Individual reports

To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or
   - Click the icon on the Tool Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Multiple reports

To print a copy of multiple reports:

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

To print the currently displayed report listing:

1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

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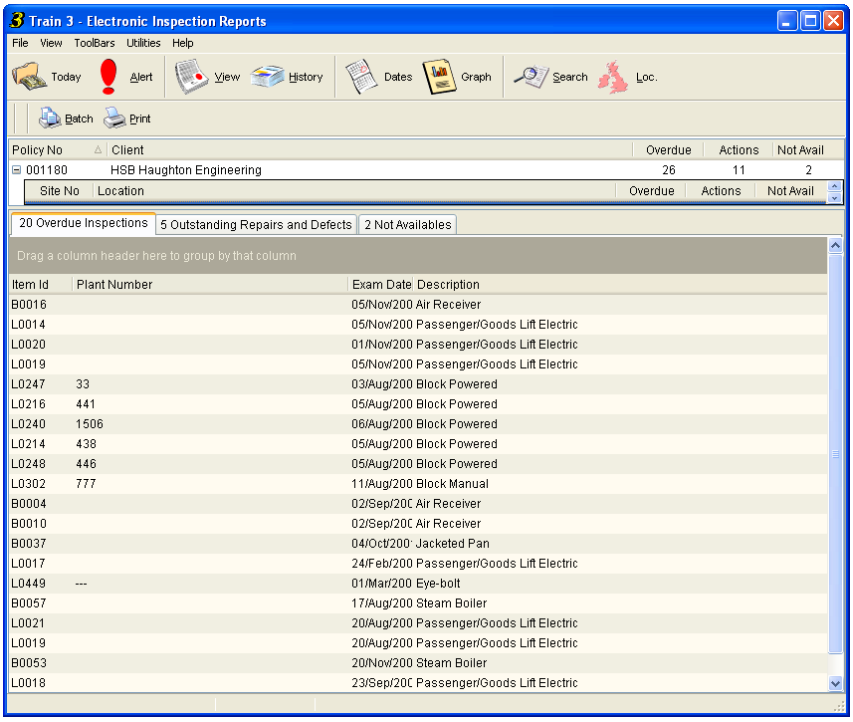
Part X

10 Location

The Location view enables the viewing of reports for locations or policies.

To open the Location screen, select Loc. from the Tool Bar:

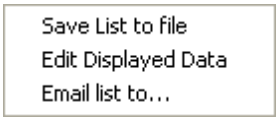

Train 3 - Electronic Inspection Reports
File View ToolBars Utilities Help
Today Alert View History Dates Graph Search Loc.
Batch Print
Policy No Client Overdue Actions Not Avail
001180 HSB Haughton Engineering 26 11 2
Site No Location Overdue Actions Not Avail
20 Overdue Inspections 5 Outstanding Repairs and Defects 2 Not Availables
Drag a column header here to group by that column
Item Id Plant Number Exam Date Description
B0016 05/Nov/200 Air Receiver
L0014 05/Nov/200 Passenger/Goods Lift Electric
L0020 01/Nov/200 Passenger/Goods Lift Electric
L0019 05/Nov/200 Passenger/Goods Lift Electric
L0247 33 03/Aug/200 Block Powered
L0216 441 05/Aug/200 Block Powered
L0240 1506 06/Aug/200 Block Powered
L0214 438 05/Aug/200 Block Powered
L0248 446 05/Aug/200 Block Powered
L0302 777 11/Aug/200 Block Manual
B0004 02/Sep/20(Air Receiver
B0010 02/Sep/20(Air Receiver
B0037 04/Oct/200 Jacketed Pan
L0017 24/Feb/200 Passenger/Goods Lift Electric
L0449 --- 01/Mar/200 Eye-bolt
B0057 17/Aug/200 Steam Boiler
L0021 20/Aug/200 Passenger/Goods Lift Electric
L0019 20/Aug/200 Passenger/Goods Lift Electric
B0053 20/Nov/200 Steam Boiler
L0018 23/Sep/20(Passenger/Goods Lift Electric

The Location screen is divided into two sections - the top section is a list of locations/ companies divided up by policy number. Clicking on the + next to a location/company opens the individual locations for that policy number. The lower half of the screen offers three tabs (Overdue Items, Outstanding Actions and Not Availables) with a Report Listing for each tab.

By default, the "Overdue Inspections" tab displays, with a count of the number of overdue inspections. It is necessary to click on the other two tabs to obtain a count of "Actions" or "Not Availables". NOTE: When the Actions tab is selected, its title will change to reflect the repairs/defects setting selected on the Alert screen.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



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Save List to file

To save the currently displayed report listing:

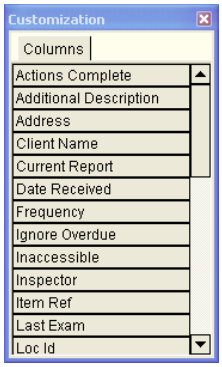
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Edit Displayed Data

Edit Displayed Data allows the customization of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.

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4. Add a subject line and any necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select View from the Tool Bar.

Email the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "e-mail report to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send Message**. The report will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See **Email Options** for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click "Email Batch" on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Save the current/viewed report

1. Right-click in the Data Area of the report.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Printing reports

Individual reports

To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or

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- Click the Print icon on the Tool Bar.

2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Multiple reports

To print a copy of multiple reports:

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Batch icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

To print the currently displayed report listing:

1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

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Advanced Features

Part XI

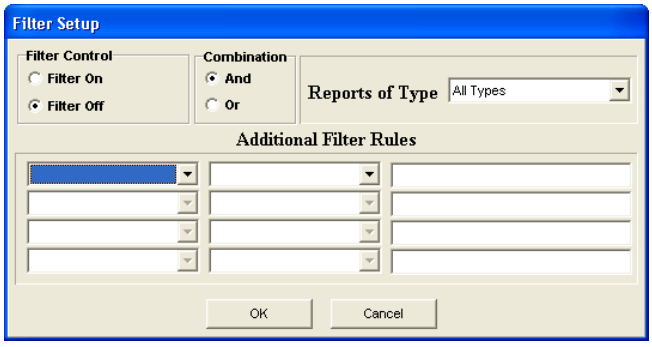
11 Advanced Features

11.1 Setup Filter

The Setup Filter enables a restriction to be placed on the set of reports with which Train is currently working - once a filter is applied, all screens within Train will only display those reports which meet the filter criteria.

Applying a Setup Filter

1. Select Utilities > Setup Filter from the Menu Bar.
2. The "Filter Setup" dialog box will open:



3. In the "Filter Control" box, select **Filter On**.
4. If a restriction on the type of report is required, click the drop-down arrow in the "Reports of Type" box to select the type of report.
5. Apply "Additional Filter Rules" as required. (NOTE: The Additional Filter Rules are constructed in the same way as a Search. Please consult the Search section for more details).

11.2 Grouping, Sorting and Filtering Report Lists

Train allows the grouping, sorting or filtering of Report Lists.

Applying a Grouping

Either:

- drag a Column title to the Grouping Area (green arrows indicate where the heading may be dropped into place); or
- insert a new field name in the Grouping Area:
  i. Right-click in the Data Area.
  ii. Select Edit Displayed Data from the subsequent menu.
  iii. Drag the appropriate field name from the Customization box to the required point in the Grouping Area and release the mouse button.
  iv. Repeat if required, and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data. (NOTE: The data refresh may take up to a minute to complete depending on the quantity of data affected. Do NOT attempt to re-close the Customization box whilst the data refresh is in progress).

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Once a Grouping has been applied, a sort or filter may be applied to the Grouped data.

Removing a Grouping

If a filter has been applied to a Grouping, the filter must be cleared before the Grouping is removed. To do this:

1. Click the down arrow on the required field.
2. Select the "(All)" option from the subsequent listing.

Now remove the Grouping:

3. Right-click in the Grouping Area and select Edit Displayed Data from the subsequent menu.
4. Drag the required field name to the Customization box and release the mouse button. (NOTE: If the filter has not been removed before the grouping option is undone, then a filtered view of the data will continue to be presented).
5. Repeat steps 1-4 as required.
6. Close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data. (NOTE: If Prime is exited before the refresh has taken place, the filter will be retained by Prime for future use).

Sorting Report Lists

Report Lists may be sorted either alphanumerically (the default setting) or reverse alphanumerically once a Grouping has been applied.

To apply a sort, click on the title of the field against which the sort is to be applied. The Report Listing will automatically refresh to reflect the sort.

Filtering Report Lists

In addition to the Setup Filter, separate filters may be applied to the field titles on a displayed report listing in order to restrict the view to display only those items which meet the filter criteria.

Applying a Filter

1. If necessary, add a field name to the Report Listing:
   i. Right-click in the Data Area.
   ii. Select Edit Displayed Data from the subsequent menu.
   iii. Drag the appropriate field name from the Customization box to the required point on the screen and release the mouse button.
   iv. Repeat if required, and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

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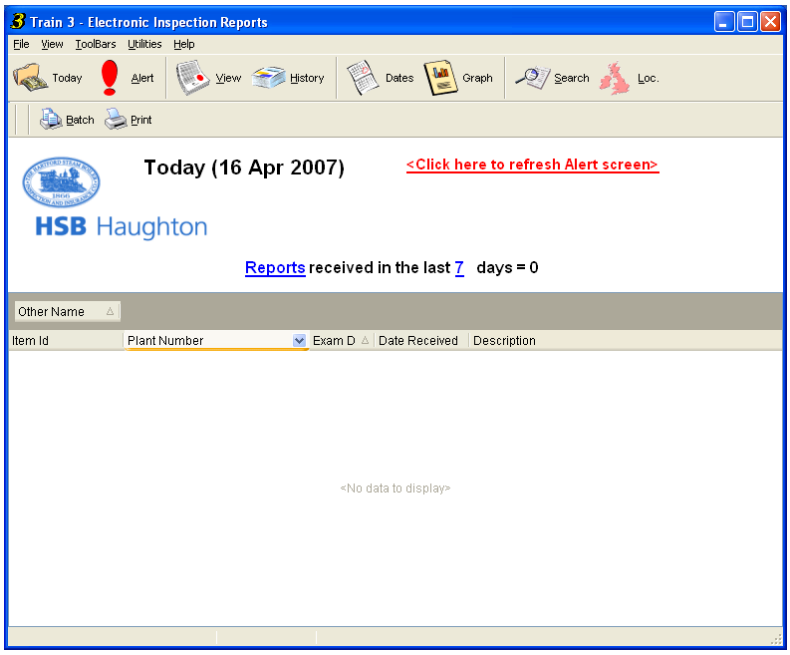
2. Hover over the field name to which the filter is to be applied, and click the down arrow that appears at the right-hand end of the field name:



3. Select the required filter type:
   - (All) – displays all data (and therefore removes any previously applied filters).
   - (Custom) – allows complex filtering across a range of criteria (see the Custom Filters section for more information).
   - (Blanks) – displays all items which have a blank value in the currently selected heading. (NOTE: Blanks is only available for fields which contain blank or non-blank items).
   - (NonBlanks) – displays all items which do NOT have a blank value in the currently selected heading. (NOTE: Non-Blanks is only available for fields which contain blank or non-blank items).
   - Specific criteria that appear under the field heading - place a tick in the relevant check box(es) to filter by the selected criteria.

   The down arrow will change colour to indicate that a filter has been applied. Once a filter is applied, a Customize bar will appear at the foot of the Data Area.

Removing a Filter

To remove a filter, either:

1. Hover over the name of the filtered field, and click the down arrow on the required field.
2. Select the "(All)" option from the subsequent listing.

(NOTE: If filters have been applied to more than one field, repeat the above steps to remove the filters on each field); or

1. Click the cross on the Customize bar. (NOTE: This will clear all filter criteria currently applied).

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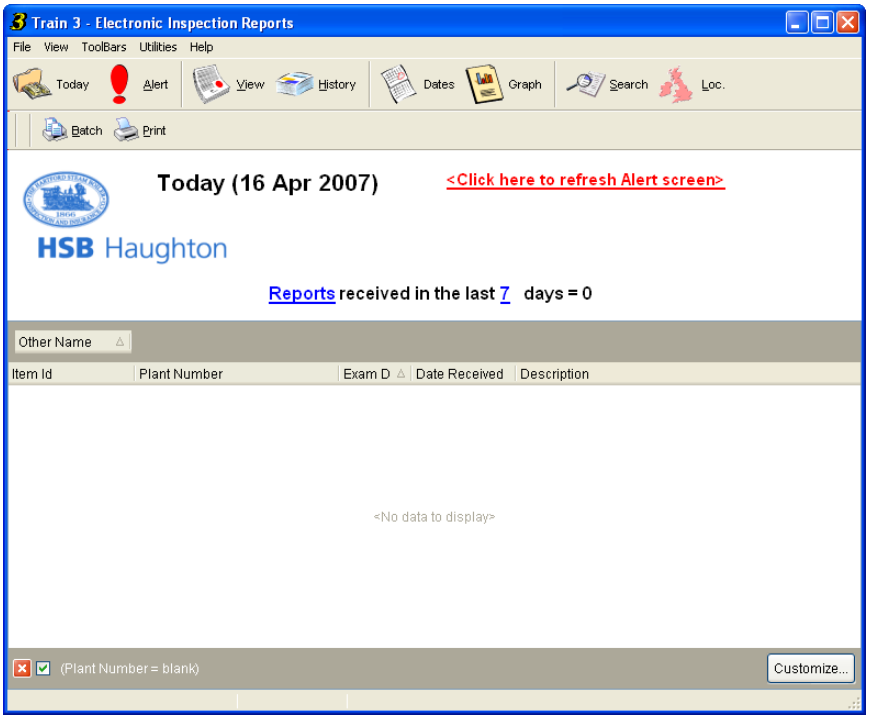
Custom Filters and the Customize Bar



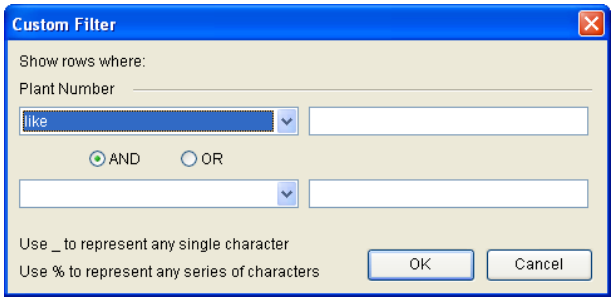
The Customize Bar appears at the foot of the Data Area when any filter is applied. The current filter will appear at the left-hand end of the Customize Bar.

- To delete the current filter, click the "X". This will clear all filter criteria from the current view. Deleting the filter will also close the Customize Bar.
- To disenable the filter, click the tick. The filter can be re-applied by re-clicking the in the tick box.

Custom Filters

More complex filters may be created using the "Custom" option:

1. Hover over the field to which the main filter is to be applied, click the down arrow, and choose "(Custom…)".
2. A Custom Filter dialog box will open:



3. Complete the lines of the filter as required, and click **OK** to apply. The filter will remain in force until it is removed.

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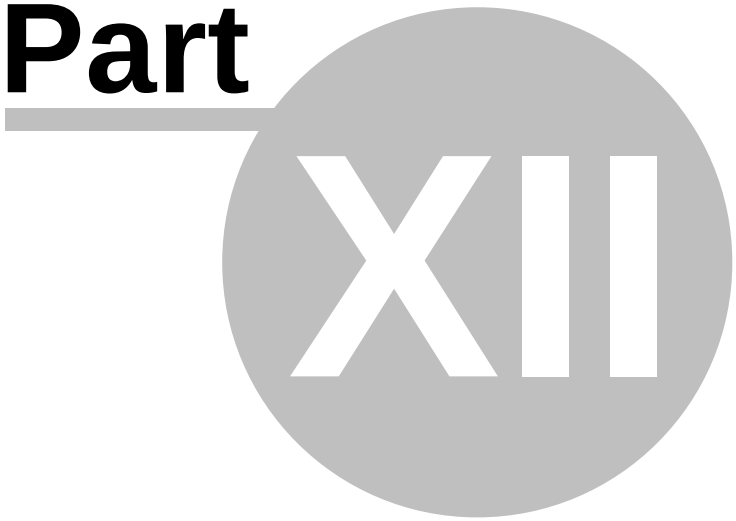
Forms available within Train



12 Forms available within Train

The following report types are available within Train:

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DELI1
EC1
ESC1
F2197
FLT1
FORM54
HIM1
HSB/E1
HWB1
LEV2A
LEV2B
LEV3A
LEV3B
LOL54
LOLI1
LOLM1
LOLP1
LOLT1
LOLT1C
MC1
NSP1
NSPP1
PIR1
PP1
PPM1
PS1
RONI1
VN1
VR1

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